Folio:

A Publication of The Hanson Publishing Group, Inc.

SEPTEMBER 1, 1990 THE MAGAZINE FOR MAGAZINE MANAGEMENT $6.50

Drug testing: Watchdog or witch-hunt?

Should your company be testing for drug use? If so, should it be testing only job applicants, or employees as well? Should counseling be offered to those who test positive? Opinions vary, but all agree on one point: You can't turn your back on the drug problem. **100**

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unfold ➤

September 1, 1990

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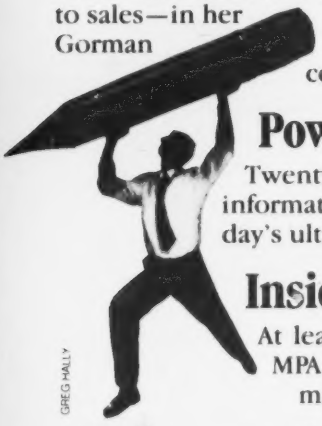

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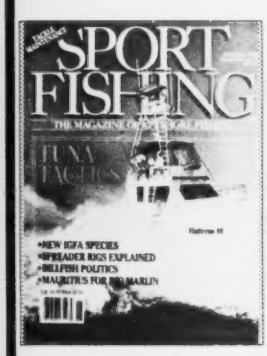
DISCRETIONARY INCOMES! RECREATIONAL SPENDERS!

293,846
Active Subscribers
38,584
Quarterly Hotline
12,018
Canadian Actives

TEST FOR:
PUBLICATIONS, CLUBS, CATALOGS, LEISURE, HEALTH & FITNESS, VACATIONS, INSURANCE, MEMBERSHIPS, TRAVEL, CREDIT CARDS, GENERAL MERCHANDISE, FUNDRAISING.

The women who is passionate about sports and fitness in her daily life!

- 33.76 MEDIAN AGE
- $51,350 AVERAGE HOUSEHOLD INCOME; 71% $35,000+
- 86.6% COLLEGE EDUCATED
- 44.3% MARRIED
- 86.6% EMPLOYED; 58% PROFESSIONAL/MANAGERIAL
- 96% MAJOR CREDIT CARD HOLDERS



56,386
Active Subscribers
9,852
Quarterly Hotline

Affluent big-game anglers and boat owners. Serious offshore sportsmen.

- 43 AVERAGE AGE
- $90,000 AVERAGE HOUSEHOLD INCOME
- SERIOUS OFFSHORE SPORTSMEN
- $1,000+ YEARLY SPENT ON FISHING & BOATING EQUIPMENT
- OTHER INTERESTS INCLUDE TRAVEL, HUNTING, GOLFING.

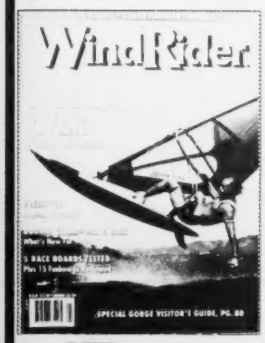
TEST FOR:
PUBLICATIONS, TRAVEL, CLUBS, SPORTS OFFERS, GENERAL MERCHANDISE, INVESTMENTS, FUNDRAISING, MEMBERSHIPS, HEALTH & FITNESS, CREDIT CARDS, FINANCIAL OFFERS, OUTDOOR OFFERS.

TEST FOR:
HEALTH & FITNESS, PUBLICATIONS, TRAVEL, TIME SHARE, LEISURE, FINANCIAL OFFERS, CREDIT CARDS, VACATION, FUNDRAISING, CATALOGS, GENERAL MERCHANDISE, INVESTMENTS, CLUBS, MEMBERSHIPS, REAL ESTATE, SPORTS OFFERS.

93,386
Active Subscribers
10,236
Quarterly Hotline
2,557
Canadian Actives

Gregarious, well-heeled skiers & small boat owners in a family sport.

- AVERAGE AGE 29;
- 52% MARRIED
- 72.7% COLLEGE EDUCATED
- $50,000 AVERAGE HOUSEHOLD INCOME; 42.7% $50,000+



41,000
Active Subscribers
7,668
Quarterly Hotline
2,206
Canadian Actives

Highly educated upscale consumers. Vacation travelers in a destination-oriented sport.

- 33 AVERAGE AGE
- 90.1% COLLEGE EDUCATED
- $59,100 AVERAGE HOUSEHOLD INCOME
- 50% PASSPORT HOLDERS
- $1,825 AVERAGE SPENT ON LAST WINDSURFING VACATION

TEST FOR:
HEALTH & FITNESS, LEISURE, CREDIT CARDS, TRAVEL, FINANCIAL OFFERS, VACATIONS, INVESTMENTS, TIME SHARE, CATALOGS, PUBLICATIONS, CLUBS, FUNDRAISING, MEMBERSHIPS, REAL ESTATE, GENERAL MERCHANDISE, SPORTS OFFERS.

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Vol. 19 No. 9

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THE MAGAZINE FOR MAGAZINE MANAGEMENT

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ABP The Audit Bureau Member MPA

Tracking publishing interns

by Susan Hovey

NEW YORK CITY—Since 1967, the American Society of Magazine Editors (ASME) has placed more than 1,000 students in summer intern positions. A much younger program, the Business Press Educational Foundation (BPEF), has placed 88 students since its inception in 1985.

Of course, keeping track of all those names hasn't proven to be easy. But if a sampling of alumni is any indication, the two programs have given hundreds of college journalism graduates a head start on careers in the industry. (ASME is affiliated with Magazine Publishers of America; BPEF, with American Business Press.)

ASME assistant director Marlene Kahan is in the process of updating a list containing information on the whereabouts of roughly one-third of the ASME alumni. From those names, approximately 180 (including freelancers) are working in the magazine industry, about one-fifth with the business press.

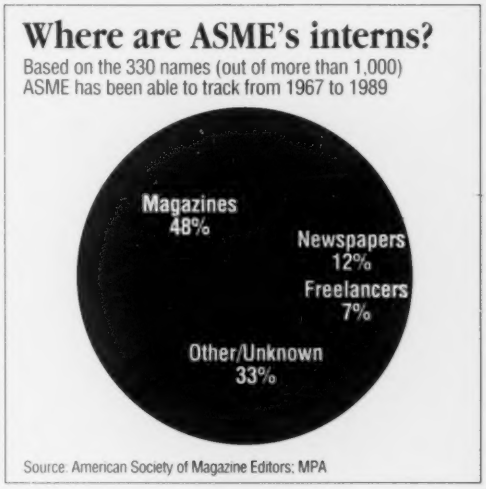
Phyllis Reed, manager of placement and education services at American Business Press (ABP), says that, of the 33 students who were BPEF interns between 1985 and 1987, at least 16 have gone on to positions with the business press. One or two others have moved over to the consumer side, "but there's not a great deal of crossover." (Most interns from 1988 and later have been out of school for a year or less.)

Reed adds that some of the more recent graduates have been placing their names in the "Employment Round-Up," a publication that brings together job seekers and business publishers. She sees this as a positive sign of the business intern experience, in light of the fact that only a small number of journalism schools offer courses specifically geared toward the business press.

The potential employee

Whittle Communications, which has an extensive intern program of its own, also takes on three or four ASME interns a-summer. "The majority of our entry-level positions are filled with former Whittle interns," notes intern specialist Kathey Gentry. "The editors like to think that every intern they pick could be a potential employee."

Obviously, there are also hundreds of former ASME and BPEF interns who do not stay in the field. Reed remembers one promising intern who, after a summer with *Chemical Week* and a stint with another trade title, found his calling elsewhere—with the priesthood.□


Where are ASME's interns?
Based on the 330 names (out of more than 1,000) ASME has been able to track from 1967 to 1989
Magazines 48%
Newspapers 12%
Freelancers 7%
Other/Unknown 33%
Source: American Society of Magazine Editors; MPA

***Most magazine interns** stick with some aspect of publishing, according to MPA figures.*

Travel Agent repositioned

New owner plans overhaul of travel weekly

by Liz Horton

NEW YORK CITY—With the ink barely dry on an agreement to buy *Travel Agent Magazine* from Capital Cities Media, Richard Friese is already making plans.

As the new publisher of *Travel Agent*, Friese, who heads the investor group that owns *Unique Homes*, plans to make the title live up to its billing as "the national newsweekly magazine of the travel industry." With a redesign and increased news coverage, *Travel Agent* will "look, feel and taste like a newsweekly," Friese explains. "Readers will feel comfortable that they are completely up to date with happenings in the industry of the week previous."

***A redesign** is in the works.*

For Friese, the purchase marks a homecoming to the travel industry. Formerly president of Ziff-Davis, he began his career there as publisher of *Travel Weekly*, then became president of Ziff-Davis's travel publications division. The years he spent in the travel industry "are the years of my career I enjoyed the most," he says, noting that *Travel Agent* has "no fit with *Unique Homes*."

Travel Agent was the third Fairchild title to be unloaded in recent weeks by Capital Cities Media, which is embroiled in a major reorganization. Soon after *MIS Week* suspended publication, *Financial Services Week* was sold to Investment Dealers' Digest, Inc.

Travel Agent, with a 53,000 circulation, ran close to 3,000 ad pages in 1989, says executive publisher David Zucker, who will remain at Cap Cities. Major competitors include *Travel Weekly*, now owned by the Reed Business Publishing Group, and CMP's *Tour & Travel News*.□

Ad slump flattens coated paper prices

No increase predicted for coated stock until mid 1991

by Cary Peyton Rich

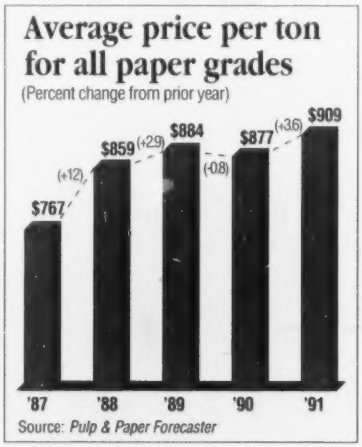
SAN FRANCISCO—With all the news about the weakening ad market and magazines losing pages, it's been easy to grow discouraged of late. But there is *one* good thing to come out of the ad slump: Coated paper prices will remain steady until at least early 1991, according to Miller Freeman's *Pulp & Paper Forecaster*.

"The most competitive markets are those using coated grades because of weakness in major advertising-based markets such as magazines and inserts," notes the executive overview of the *Forecaster*. "Sluggish demand and increasing capacity, coupled with high imports, are keeping downward pressures on prices for coated papers, and the highly competitive nature of these markets is going to be around into early 1991."

However, 1989 brought nearly 500,000 tons of new capacity on-line.

Meanwhile, a recent survey conducted by Magazine Publishers of America found that publishers expect to use only 0.6 percent more coated groundwood in 1990. They believe demand will increase 4.4 percent for next year.

But although list paper prices are expected to remain steady into mid 1991, real prices are going up, says Dan Temple of Jaakko Poyry, a paper consulting firm. "Real prices are going up by reason of less discounting," he says. Real prices of coated groundwood are rising by about $20 a ton.



***Strong demand will lead** to an average price increase of 3.7 percent for all paper next year. However, due to sluggish ad pages, coated grade list prices are expected to remain steady.*

Temple predicts no new list price increases until mid 1991, but he warns that the market will be driven by coated free sheet prices, not magazine ad pages. Although major new coated free sheet capacity is going on-line in mid 1991, Temple says a price increase for that grade early in the year could push coated groundwood prices up, also.

Ad recovery could spark hikes

And what if publishers' wishes are answered and ad pages pick up? "If there's a decent recovery next year, by midyear there could be a nice [list] price increase," says Temple.

Paper mill operating levels are expected to increase to 92 percent in 1990 from 90 percent in 1989. The lowest U.S. operating levels continue to be for coated paper. But levels for coated groundwood grades are expected to recover strongly by late 1991 because no major capacity is being added.□

Absolut-ly—signed, sealed and delivered

by Ellen Tulin

NEW YORK CITY—Received any letters bearing a canceled stamp marked "80 proof"? Don't blame Ed Kosner. The publisher and editor of *New York Magazine* says he checked with the United States Postal Service (USPS) before publishing Absolut Vodka's "Absolut First Class," a set of stamps bound into the July 2-9 issue.

"They were meant to be letter enhancers, like Easter Seals, but some people sent them out as stamps," says Richard Lewis, senior VP and management supervisor at TBWA, Absolut's advertising agency.

The eye-catching ad—featuring the works of artists Andy Warhol, Keith Haring, Ed Ruscha and Kenny Scharf—garnered a lot of media attention. But so far, there've been no complaints from the USPS, which processed mail bearing the bogus stamps.

***Absolut's bogus stamps** sneaked through the U.S. Postal Service.*

It may be that the USPS has egg on its face. In a televised report, says Lewis, postal officials were heard to have said, "You can't get it by our equipment."

How many *New York Magazine* readers were able to send letters with the Absolut stamps? No one knows for certain, but the USPS maintains that the amount is not worth worrying about.

"It isn't something we have a lot of concern for," says a USPS spokesperson. "Not too many people try to do it."□

Looking on the bright side

Ad spending will revive after 1991, according to industry forecaster

by Liz Horton

NEW YORK CITY—Consumer and trade magazine publishers face a slow two years as the economy contracts, but advertiser spending on magazines will revive after 1991 as corporate restructuring is completed, according to the 1990 Communications Industry Forecast by Veronis, Suhler & Associates, investment bankers to the communications industry.

The 1992 election/Olympics year will also pull extra ad dollars into consumer magazines, bringing total spending (from advertisers and readers) up an average of 7.5 percent a year over the next five years. Business titles, heavily hit in recent years by restructuring and competition from information services, trade shows and direct mail, will do better than they have been; spending on these magazines will grow at an average of 5.7 percent a year.

Consumer magazines

Spending on consumer magazines will continue to grow faster than the GNP over the next five years, but "relative growth is declining compared to the economy," says president and co-CEO John Suhler; while spending on magazines outperformed the economy by 1.2 percent between 1984 and 1989, it will do so by only 0.3 percent over the next five years.

Sluggish economic growth, already generating a plunge in ad dollars, will continue through 1991. The quadrennial spike—the phenomenon in which increased political and Olympics-related advertising pulls ad dollars from the years preceding and following the quadrennial year—will pull ad spending up 9.6 percent in 1992. The completion of restructuring in the economy will boost spending in 1993 and 1994.

Spending cutbacks in the tobacco, alcohol and computer industries brought slow years between 1984 and 1987, but 1988 ad spending in magazines jumped 8.3 percent, primarily because of the quadrennial spike. The decline expected after 1988 did not materialize as companies emerged from restructuring, national advertising revived, and unit circulation increases brought in higher ad revenues.

Circulation spending will continue to grow faster than ad spending on consumer magazines, both because of price increases and increased unit circulation. Over the past five years, prices have increased at an average annual rate of 4.7 percent, while the CPI has risen just 3.6 percent. Over the next five years, prices will rise 5.4 percent a year.

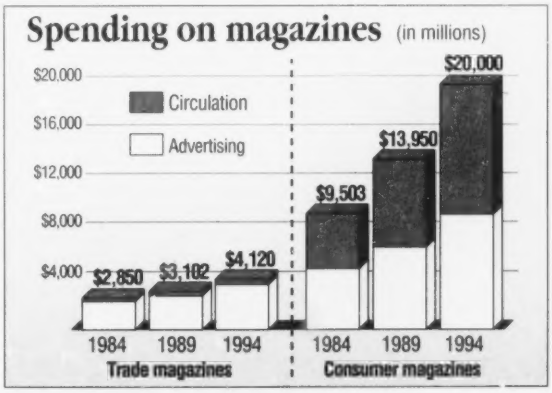
Trade titles

Trade magazines "will continue to underperform economic growth," says Suhler, but they have been catching up a bit over the past two years as economic restructuring has wound down. Although the slow economy will limit increases in 1990 and 1991, trade magazines will perk up afterward, with spending on these publications growing an average 5.7 percent a year between 1989 and 1994, up from 3.9 percent annually for 1984 to 1989. Only as they close in on 1994, however, will spending on trade magazines grow at rates approaching GNP growth.

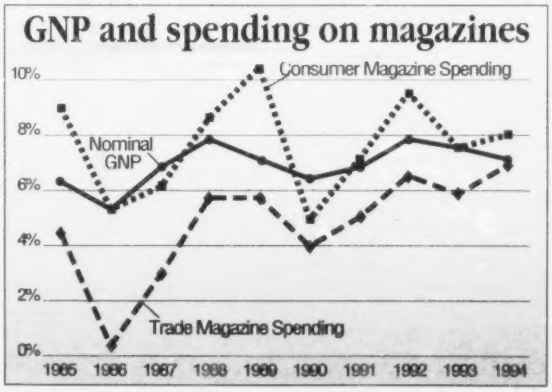
"Trade magazines typically prosper in expanding markets," says the report. Restructuring has meant unbalanced ad spending programs; fewer new technologies, companies and products generating editorial and advertising; and smaller audiences.

"More business publications are down now in pages than in the past 10 to 15 years," says James Boddorf, executive vice president with Veronis.

For many, however, ad price increases mean revenues have not been affected. Because of the close links between the health of trade magazines and the industries they cover, magazines in expanding industries—among them telecommunications, architecture, the home building market, agriculture and oil and gas—will do better than average. □



***Readers spent more on consumer titles than advertisers did** during 1989, a trend that will continue. Meanwhile, trade advertising will increase slightly by 1994.*



***Trade magazines will grow at near-GNP rates** by 1994, for the first time in a decade. Note the effects of election/Olympics years on spending growth.*

Pages: Fighting the battle

(CONTINUED FROM PAGE 180)

tinue to take major bites out of the business marketing budgets that were once the domain of the print publisher. Here are some examples from a study done by Business Marketing on where the communication budget dollars are allocated.

- $94 billion is being spent.
- $8.6 billion: Advertising.
- $30.1 billion: Direct marketing. (Included in that is $27 billion from telemarketing.)
- $21.0 billion: Trade shows.
- $7.6 billion: Sales promotion.

One could look at the $8.6 billion for advertising and feel pretty good about the "crumbs that fall from the budget table." But take a closer look at the breakdown of that $8.6 billion ad budget:

- $3.0 billion: Trade print.
- $1.1 billion: Consumer print.
- $2.0 billion: Yellow Pages.
- $1.1 billion: Ad production.

And smaller amounts go for directories, outdoor and broadcast.

Bad masquerading as good

Well, $3 billion still doesn't look too shabby—or does it? Remember, trade print received about 50 percent of the budget in the red-hot sixties, but now it looks more like 3 percent. I know about all those statistics that show print representing 30 percent of the communication manager's budget—and that works with the above numbers. But the growth tools of the nineties many times are part of the sales manager's budget (trade shows, telemarketing, incentives, sales force management), and the money goes there at the expense of the communication manager's budget.

For example, the latest industry figures show direct marketing and trade shows being the biggest gainers, taking 12.3 percent and 16.5 percent of the communication manager's budget. So even though the communication manager's budget can increase 10 percent, the sales manager, directly or indirectly, could easily get a boost to his budget of 30 to 40 percent more, based on the growth of alternate media tools compared to print.

What's happening?

It's called ROI—return on investment. The sales manager likes direct sales tools such as trade shows and the phone because they are more accountable. Top management likes the sales manager's plan because they can see by the numbers where it's going. The trade print publisher has not been able to do that very effectively for the ad manager/ad agency. Maybe that's why published reports show 50,000 ad pages leaving the market during 1985/88, pages being off 5.3 percent in 1989 over 1988, and looking down again for 1990.

"The best way to win this war is to utilize the one thing the new enemy would kill for: The dedicated magazine reader."

Although those 50,000 pages do not represent the entire trade print market, they do come from a representative sample of the publishing industry—516 key magazines serving their segments, and measured by five different companies. The trend is uncomfortably clear.

Turning the battle around

The only solution for this weary publisher "commander" is to use the tactics of his "unseen" enemy. These are the people with the great growth numbers:

- Telemarketing, 140 percent over two years, in some segments.
- Sales promotion, 26 percent in 1989.
- Direct marketing, 14 percent.
- Trade shows, 17 percent.

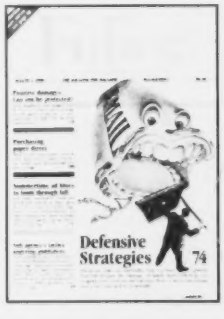
The best approach is to utilize the one thing the new enemy would kill for: the dedicated magazine reader. Publishers sell this gold mine to anyone and everyone with no thought that they are giving away the best part of their competitive strategy. Why not protect that list and use it against the new competition by selling what *they* sell—ROI-based accountable programs that include telemarketing, trade shows, direct marketing, event marketing, video magazines, electronic databases and electronic magazines, training videos and "custom" industry seminars. Believe me, there is no vendor of communications one-on-one services that can top the credibility and loyalty of a trade magazine and its reader.

The revenue stream possibilities for a publisher are considerably increased: He is no longer fighting over $3 billion in a declining market with 4,000 competitors, but fighting for a share of $67.2 billion (advertisement, direct mail, trade shows and sales promotion). Even the crumbs from the table look a lot better.

And I haven't even gotten into the possibilities five years out of joint ventures with the Mini-Bells, Prodigy, GE, etc. when their electronic database publishing vehicles need the one thing they will never get: reader loyalty to the editorial product and editor of a magazine.

So why don't we all stop shooting ourselves in the foot and do what some very smart publishers are starting to do: Concentrate on the real war and stop trying to win the short-term battles.□

Wouldn't you like your own copy of



Turn to page 111 to begin your personal subscription today!

Where have all the pages gone?

It depresses me when a trade publisher gloats over a 10 percent gain in market share— when his industry segment just showed an overall yearly decline in pages of 20 percent. I'm reminded of a movie battle scene where the commander is winning the battle on his North front (where he is), but loosing it on the East, West and South fronts. And he is so close to the North battle that he doesn't see he is losing the war to an enemy he has yet to meet.

Specifically, I'm referring to the fact that, overall, the trade print publishing industry seems to be loosing more and more pages to other forms of marketing/communications.

Why? Is the buyer of media sales vehicles less than informed when it comes to evaluating media? I'm sure many publishers, media sales reps and publishing executives might say yes. After all, several studies show the effectiveness of trade print over other media for generating leads from prospects, for selling products (the ARF/ABP study), and, from a CPM standpoint, reaching a very targeted audience very efficiently.

The real battle is not to increase pages over your print competitor, but to increase market share over other media

In fact, anyone who has been in the business of business marketing for any length of time would not argue with the above. What they would argue is whether that "commander" selling them this excellent tool is really doing a credible job of presenting his product in comparison to other media tools.

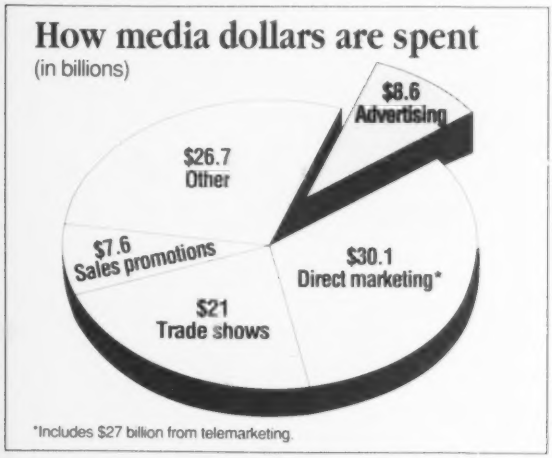
But, a publisher might ask, why remind a prospect that there are any other tools out there? That battle raging on the East, West and South is the problem of the telemarketing, sales promotion, direct mail, trade show and electronic database people—not me. Is it really?

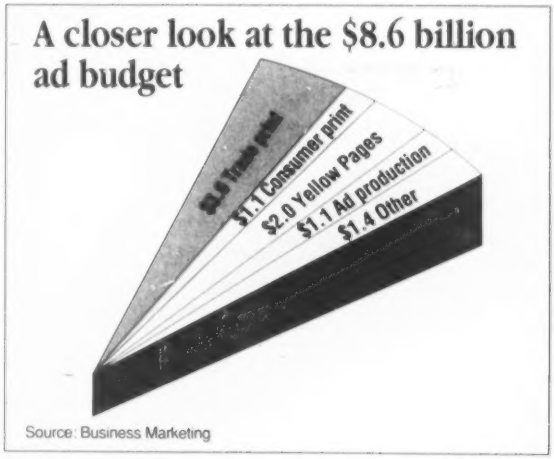
Where the money goes

Actually, these media forms con-

(CONTINUED ON PAGE 179)

Jim White is president and chief executive of White Marketing Group. He had been vice president, director of client services at Bozell & Jacobs, and vice president, corporate marketing at Chilton Publishing.





***Who is getting the money?** $8.6 billion out of roughly $94 billion looks like a pretty good amount spent in advertising—until you take a closer look and realize that of that $8.6 billion, only $3 billion goes to trade print.*